

## USNA AA Shared Interest Groups Pilot Project Proposal

**Purpose:** Obtain USNA Alumni Association BOT Executive Committee approval to proceed with a pilot project on Shared Interest Groups beginning in January 2017.

### **Background: Why “Shared Interests Groups?”**

Many university alumni associations across the country use affinity groups, known as Shared Interest Groups, to strengthen their relationships with their alumni. The Membership and Alumni Services Committee (MASC) has had many discussions on Shared Interest Groups, and the committee believes these affinity groups could be valuable as a means to increase our Alumni Association’s engagement with our alumni.

Engagement is a USNA Alumni Association and Foundation core competency as stated in our Strategic Plan 2020. This core competency is also clearly reflected in the Association’s Vision Statement...

“We are the primary source for the community of Naval Academy alumni, family and friends worldwide to maintain active lifetime links **and be engaged with each other and the Naval Academy and its traditions.**”

Plan 2020 further recognizes that within the Association’s operating environment there is a “...trend for individuals to belong to all types of unique groups and communities”... and this trend “... will increase pressure to create a high value from Alumni Association membership. The rationale for being involved in the Alumni Association will have to be more compelling and engaging...”

Because of these trends one of the themes from Plan 2020’s strategic direction is to “... **Foster and strengthen engaged relationships with increasingly diverse constituencies that comprise the US Naval Academy Community...**”

Finally, one of Plan 2020’s goals is to “...Build and sustain lifelong and meaningful relationships with increasing numbers of alumni, parents, families and friends.” One of the primary performance indicators used to determine if this goal has been successful will be by measuring if “...Alumni, families, and friends across ten generations are **more actively engaged and satisfied** with alumni community connections.”

MASC has informally reached out to some groups of organized USNA alumni to determine if there is interest in forming Shared Interest Groups and several have said “yes” (USNA Football Brotherhood and Crew). Therefore, the MASC recommends to

the BOT that we move forward with a Shared Interest Group pilot project to establish if there is a broad level of interest across alumni, determine impact on USNA Alumni Association staff, and establish policies and procedures that best fit our Naval Academy culture and experience.

The proposed pilot project will evaluate the principles and general operating procedures for USNA Alumni Association Shared Interest Groups as outlined in the “Draft Board Policy Concerning Shared Interest Groups” (see Appendix A).

### **Pilot Project:**

1. Pilot Project Background: USNA AA Shared Interest Groups are defined as communities of alumni that actively communicate or gather around a central unifying purpose and a common shared affinity or bond based on shared experience, background, academic affiliation, profession or other USNA-related interest beyond class year or chapter affiliation. SIGs shall complement the role that the Chapters and Class organizations play in engaging USNA alumni, and not compete with, but rather enhance the Chapter or Class organizations. SIGs may be entirely virtual in nature, or may be based regionally. SIGs shall be aligned with the missions of the United States Naval Academy and the United States Naval Academy Alumni Association and Foundation.
2. Project Duration: MASC proposes the pilot project take place over a period of 18 months beginning in January 2017. The pilot project will include 3-5 pilot SIGs which will organize and operate in a manner consistent with the draft Policy Statement Concerning Shared Interest Groups found in Appendix A. These pilot SIGs will understand and acknowledge the temporary nature of the pilot project and agree to provide data to support USNA AA staff analysis.
3. Participants in Pilot Project: The MASC, supported by the Alumni Association, will solicit for SIG interest from existing organized groups of alumni, as well as, from other interested alumni who want to form SIGs. A goal of the pilot project is to collect data from both already organized groups and from “new-start” groups to assist in evaluating the requirements and benefits of a future Alumni Association SIG program. The pilot project will be limited and will not exceed 5 SIG pilots during this period.
4. Process to Establish Pilot SIG: An individual USNA graduate or a group of alumni seeking recognition as a SIG will submit a draft charter and a membership list to the MASC for USNA AA BOT review and approval. The MASC will review, discuss, and

vote on submitted SIG pilot charters. The MASC will consult with the Governance Committee as needed. Those that are approved by MASC will be submitted to the Executive Committee for approval and then to the full AA BOT for consideration and vote.

5. USNA AA requirements for participation in the SIG Pilot Program: The USNA AA will provide specific initial support to approved SIGs and will require the SIGs to adhere to the draft General Operating Principles outlined in Appendix A. In particular, SIGs should pay attention to paragraph 6.a.iii addressing limited liability and paragraph 6.a.iv concerning state tax-exempt status.
6. Pilot Project Timeline: The following timeline is proposed for the SIG Pilot Project:
  - 1) **January – March 2017**: MASC & Alumni Association staff solicit alumni to form Shared Interest Groups
  - 2) **April – June 2017**: MASC & Alumni Association staff review submitted SIG charters and submit approved charters to EXCOM for approval to proceed
  - 3) **May 2017**: MASC reports pilot project progress to EXCOM & BOT at Spring meeting
  - 4) **July 2017 – June 2018**: MASC and Alumni Association staff work with SIGs to establish beneficial relationships
  - 5) **December 2017**: MASC reports pilot project progress to EXCOM & BOT at Fall meeting
  - 6) **January 2018**: SIGs submit annual reports to Alumni Association staff
  - 7) **February 2018**: Alumni Association submits survey to all SIGs to collect data
  - 8) **May 2018**: MASC reports pilot project progress to EXCOM & BOT at Spring meeting and seeks approval to convert the pilot into a formal program or end the SIG project
  - 9) **June 2018**: Pilot completed. Alumni Association conducts survey/interview with SIG leaderships
7. SIG Data Collection and Evaluation: Prior to project start, the Alumni Association will define the metrics and data to be collected that will be needed to evaluate the SIG pilot. Each SIG in the pilot project shall agree to provide data as requested by the USNA Alumni Association. The data will at a minimum include:
  - Level of SIG interest among alumni (survey).
  - Demographics of those alumni expressing SIG interest.
  - Level of satisfaction by SIG participants (survey; periodic).
  - Level of support by SIG members.

- SIG impact on regional or class organizations to ensure SIGs complement and do not detract from the existing Chapter and Class organizations, e.g. chapter membership impacts before and after SIG formation; class reunion participation rates, etc.
  - Staff time dedicated to administratively support each SIG.
  - USNA AA resources required to administer SIGs to include evaluation of appropriate fee structures to support the SIGs.
8. Pilot Project Oversight: MASC, working with Alumni Association staff, will update the USNA AA Board of Trustees at each meeting regarding pilot project metrics and direct feedback from SIG leadership.